



23 Jan.2023

INDEX PERFORMANCE

INDIAN INDICES	LATEST	% 1D	% YTD
CNX NIFTY	18,104	0.4 %	2.5 %
BSE SENSEX	60,622	(0.4) %	2.7 %
CNX BANK	42,507	0.0 %	14.4 %
CNX MIDCAP	31,100	0.0 %	3.2 %
CNX SMALLCAP	9,569	0.0 %	(9.8) %
GLOBAL INDICES	LATEST	% 1D	% YTD
DOW JONES	33,375	1.0 %	0.7 %
S&P 500	3,973	1.9 %	3.9 %
FTSE 100	7,771	0.3 %	2.9 %
HANG SENG	22,045	1.8 %	9.4 %
NIKKEI	26,554	0.6 %	3.3 %
SHANGHAI COMPOSITE	3,265	0.8 %	4.8 %

FOREX RATES

	LATEST	% 1D	% YTD
USD/INR	81.32	(0.2) %	(1.6) %
EUR/USD	1.08	0.0 %	1.1 %
GBP/USD	1.24	0.2 %	2.2 %
USD/JPY	128.38	(0.7) %	(2.1) %
USD/AUD	1.45	1.3 %	(1.2) %
USD/SGD	1.32	0.2 %	(1.4) %

COMMODITIES

	LATEST	% 1D	% YTD
WTI Crude(USD/bbl)	82	1.6 %	6.1 %
Gold(INR/10g)	51,317	0.1 %	6.6 %
Gold Comex(USD/oz)	1,911	0.1 %	3.9 %
SILVER(INR/1Kg)	66,740	(0.3) %	7.5 %
Aluminium(USD/MT)	2,586	1.8 %	10.6 %
Copper(USD/MT)	9,232	0.5 %	10.0 %

FIXED INCOME

INTERBANK RATES	LATEST	BPS 1D	BPS YTD
10 Y GSec US 10	3.5	0.1 %	(0.4) %

Global Economy: The National Association of Realtors released a report on Friday showing a continued decline in U.S. existing home sales in the month of December, although the decrease was much smaller than economists had expected. NAR said existing home sales slumped by 1.5 percent to an annual rate of 4.02 million in December after plunging by 7.9 percent to a revised rate of 4.08 million in November. The People's Bank of China on Friday kept its one-year loan prime rate, or LPR, unchanged at 3.65 percent. Similarly, the five-year LPR, the benchmark for mortgage rates, was maintained at 4.30 percent. Markets had widely expected the PBoC to retain the LPR as the medium-term lending facility, or MLF, which acts as a guide to the LPR, was kept unchanged at 2.75 percent last week. The bank had added CNY 779 billion via MLF. Japan consumer prices increased the most in 41 years in December driven by higher energy and food prices, official data showed. Core inflation that excludes fresh food advanced to 4.0 percent, as expected, from 3.7 percent in November, figures from the Ministry of Internal Affairs and Communications showed. Overall consumer price inflation accelerated to 4.0 percent in December from 3.8 percent in November. Germany's producer price inflation eased for the third straight month in December to reach its lowest level in just over a year amid a moderation in energy prices, data from Destatis showed. The producer price index, or PPI, climbed 21.6 percent year-over-year in December, which was slower than the 28.2 percent surge in October.

Global Indices: While the Nasdaq spiked 288.17 points or 2.7 percent to 11,140.43, the S&P 500 surged 73.76 points or 1.9 percent to 3,972.61 and the Dow jumped 330.93 points or 1.0 percent to 33,375.49.

Indian Economy: Domestic air passengers' traffic registered an annual growth of 47.05% in the calendar year 2022 in comparison to the corresponding period of January to December 2021. In a report, Directorate General of Civil Aviation stated that passengers carried by domestic airlines during January to December 2022 were 1232.45 lakh as against 838.14 lakh during the corresponding period of previous year, registering annual growth of 47.05% and monthly growth of 13.69%.

Equity Market: The barometer index, the S&P BSE Sensex shed 236.66 points or 0.39% to 60,621.77. The Nifty 50 index declined 80.20 points or 0.44% to 18,027.65. The 50-unit index has fallen 0.76% in two days.

Corporate News: On a consolidated basis, Reliance Industries (RIL) net profit declined 2.8% to Rs 15,792 crore on 17.4% increase in net sales to Rs 2,17,164 crore in Q3 December 2022 over Q3 December 2021. RIL reported exceptional income of Rs 2,836 crore in Q3 December 2021. UltraTech Cement reported consolidated profit after tax of Rs 1058 crore in Q3 FY23 from Rs 1173 crore in Q3 FY22. Net sales rose to Rs 15299 crore in Q3 FY23 from Rs 12710 crore in Q3 FY22.



FUND FLOWS

	<i>LATEST</i>	<i>MTD</i>	<i>YTD</i>
FII(USD mm)	72.3	(101.4)	(24.9)
MF(INR cr)	529.0	204.7	625.9

MARKET TURNOVER

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
Cash(INR cr)	2,691	41,615	50,860
F&O(INR cr)	9,649,683	20,692,304	13,895,719

MARKET VOLATILITY

	<i>LATEST</i>	<i>AVG MTD</i>	<i>AVG YTD</i>
CBOE VIX	19.9	20.6	25.3
NSE VIX	13.8	14.8	18.2

NSE INDICES / SECTORAL PERFORMANCE

	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>		<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
Banks	42,507	0.4 %	14.4 %	Energy	26,135	(0.1) %	(1.2) %
IT	29,530	(0.3) %	(18.7) %	Pharma	12,606	(0.7) %	(7.2) %
Metals	6,805	(0.9) %	5.1 %	Finance	18,772	0.2 %	7.5 %
Auto	12,692	(0.6) %	18.9 %	PSU	4,230	0.0 %	49.2 %
FMCG	43,900	(1.0) %	19.6 %	Real Estate	427	(0.7) %	(9.9) %

NSE MOVERS AND SHAKERS

<i>TOP GAINERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>	<i>TOP LOSERS</i>	<i>LATEST</i>	<i>% 1D</i>	<i>% YTD</i>
One 97	551	3.6 %	(3.6) %	Havells In	1,154	(4.3) %	(1.7) %
Hind.Aeron	2,510	2.3 %	64.6 %	Hind. Unil	2,549	(3.8) %	22.6 %
Adani Tota	3,919	2.2 %	74.2 %	Indus Towe	171	(2.8) %	(22.5) %
Dabur Indi	566	2.0 %	4.3 %	Asian Pain	2,788	(2.7) %	(10.5) %
GAIL (Indi	99	1.4 %	(8.4) %	ICICI Pru	471	(2.6) %	(7.3) %

EVENTS CALENDAR

<i>EVENT</i>	<i>DATE</i>	<i>TIME(GMT)</i>	<i>REGION</i>	<i>ACTUAL</i>	<i>PREVIOUS VALUE</i>
NHPI m/m	23-01-2023	19:00	CAD	-	(0.002)
Consumer Confidence	23-01-2023	20:30	EUR	-	(22)
ECB President Lagarde Speaks	23-01-2023	23:15	EUR	-	-
Monetary Policy Meeting Minutes	23-01-2023	05:20	JPY	-	-

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